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Implications of the 1975 Soviet Harvest

I. Developments in 1975

A. The 1975 crop shortfall

- farm output down 8 1/2%
- grain crop of only 140 million metric tons; output of most other major crops below 1974 levels

B. Immediate measures

- feed conservation
- grain imports; US-USSR long-term grain agreement; limit grain exports
- use of non-strategic grain reserves
- slaughtering of livestock

C. Consumer largely unaffected

- per capita food consumption up 1 1/2%
- per capita meat consumption up 1%

D. Other sectors of the economy

- GNP grew about 2 1/2%
- industrial production unaffected

E. Hard currency deficit

- roughly \$5 billion deficit in 1975
- imports up; little export growth

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## II. Outlook for 1976

### A. The consumer suffers

- livestock slaughtering will continue
- per capita consumption of livestock products will drop
- shortages

### B. Growth in 1976

- GNP growth smaller than usual
- 4 1/2% rise in industrial production planned
- planned rebound in agriculture unlikely

### C. Foreign trade

- another large deficit likely

### D. Impact of another crop failure

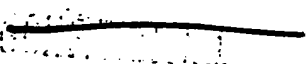
- too early to estimate size of 1976 grain crop
- minimum grain requirement put at roughly 175 million tons

### E. Political outlook

- Polyansky dropped from Politburo and as Minister of Agriculture

## III. Longer-term Outlook for Agriculture

- plans for 1976-80 have not been revamped -- with the exception of livestock goals
- investment in agriculture will grow slightly slower than remaining sectors; no major shift in agriculture's share of total investment

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- as yet, no new grandiose schemes for agriculture
  - short-run adjustments possible
  - even so, output goals are high

# USSR: PRODUCTION OF MAJOR CROPS

	Annual Average 1966-70	1971	1972	1973	1974	Annual Average 1971-74	Estimated 1975
Total value of farm output <u>a/</u>	4.5	0.1	-6.5	14.9	-1.3	1.5	-8 1/2
Crops <u>b/</u>	5.5	-1.2	-10.7	29.6	-11.8	0.2	-10
Animal products <u>c/</u>	3.7	1.2	-3.2	4.0	8.5	2.6	-7
Production of major farm commodities							
			--Million Metric Tons--				
Grain	167.6	181.2	168.2	222.5	195.7	191.9	140
Potatoes	94.8	92.7	78.3	108.2	81.0	90.0	82.5
Sugar beets	81.1	72.2	76.4	87.0	76.4	78.0	68.0
Sunflower seeds	6.4	5.7	5.0	7.4	6.8	6.2	5.0
Vegetables	19.5	20.8	19.9	25.9	23.1	22.5	22.5
Cotton	6.1	7.1	7.3	7.7	8.4	7.6	7.9
Meat	11.6	13.3	13.6	13.5	14.6	13.7	15.2
Milk	80.6	83.2	83.2	88.3	91.8	86.6	90.8
Wool (thousand tons)	398	429	420	433	461	436	463
			--Billion--				
Eggs	35.8	45.1	47.9	51.2	55.0	49.8	56
			--Index (1965=100)--				
Livestock inventories (end of year) <u>d/</u>	102.6	112.2	112.1	115.3	118.6	114.6	114.7

a. Agricultural output for sales and home consumption minus farm products used for seed and livestock feed. Price weights for 1970 have been used in aggregating the physical output of crops and animal products (including changes in inventories of livestock).

b. Value of food and technical crops less seed but including the portion fed to livestock.

c. Value of output of meat, milk, eggs, wool, and other livestock products less livestock feed and adjusted for changes in herd inventories.

d. End-of-year inventories for cattle, hogs, sheep, goats, and poultry weighted by relative liveweight prices in 1970.

# USSR: LIVESTOCK HERDS

	Annual Average 1966-70	1971	1972	1973	1974	Annual Average 1971-74	1975
	--Million Head, End of Year--						
Number of livestock							
Cattle	96.9	102.4	104.0	106.3	109.1	105.4	111.0
Hogs	56.3	71.4	66.6	70.0	72.3	70.1	57.8
Sheep and goats	142.1	145.3	144.7	148.5	151.1	147.4	146.9
Poultry	566.9	652.7	686.5	700.0	747.7	696.7	674 (c)